


### QTAC Compass Instructions for Coordinators

1. One of our staff will create an account for you. Then, you will receive an automated invitation by e-mail to log into the portal and fill in the remaining registration information at <https://compass.qtacny.org/login>. You will have **48 hours** to activate your new account; after 48 hours the invitation expires, and you will need to contact [livingwell@utah.gov](mailto:livingwell@utah.gov) to have another invitation generated and sent to you.
2. The FIRST time you login, the system-generated email with your login code may go to spam—check your spam folder for an email with “QTAC” in the title. Also, the FIRST time you login, if you put a landline as your primary contact telephone number, make sure you list “voicemail” NOT “text message” as the way to receive the login password.
3. After updating your account with a unique password, you will need to **verify** your account by receiving a text or voice message. Then you can log in at <https://compass.qtacny.org/login> with your e-mail address and password.
4. Once you log in, you’ll see your **Dashboard** (Home) screen.

 Log In

**Email address**

**Password**

[Forgot Password?](#)

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Users are only authorized to log in to their own account. If you have received login credentials by any means other than the Compass registration process, please contact the QTAC immediately.

The screenshot shows the Compass QTAC+ Dashboard. At the top, there is a navigation bar with links: Home, Sites, Personnel, Workshops, Training, Reporting, and Administration. A search bar labeled 'Workshop Search' is on the right. The main content area is titled 'Dashboard' and contains three sections:

- Alerts:** A yellow box with the message 'You have 111 sessions that are missing attendance.' and a link 'View Sessions'. A red arrow points from the number '1' in the list to this section.
- Help Topics:** A list of topics: '1. Contacting QTAC-NY', '2. Printing data packet forms', and '3. Implementation site', with a link 'Show 98 more topic(s)'. A red arrow points from the number '1' in the list to this section.
- Event Calendar:** A calendar for June 2016. It has tabs for 'month', 'week', and 'day'. A red arrow points from the number '2' in the list to the 'month' tab. Another red arrow points from the number '3' in the list to a specific day (the 1st) on the calendar.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
		10:00a SO - UT-461-4371	10:00a CD SMP - UT-461-4450 6:00p CPSMP - UT-461-4443	9:00a SO - UT-461-4439		
5	6	7	8	9	10	11
		10:00a SO - UT-461-4371	10:00a CD SMP - UT-461-4450 6:00p CPSMP - UT-461-4443	9:00a SO - UT-461-4439		
12	13	14	15	16	17	18
		10:00a	10:00a	9:00a		

1. You can also view **Alerts** and **Help Topics**.
2. From the Dashboard, you can view the workshop calendar by **month**, **week**, or **day**.
3. You can also view a **Workshop** by clicking on the calendar.

4. First, create a new Implementation **Site** if your site doesn't already exist in the portal, before you create a new Workshop.

Compass QTAC

Welcome back, Jessical  
Account Settings | Help | Logout  
Contact QTAC: (877) 496-2780 | qtaccompass@albany.edu

Home Sites Personnel Workshops Training Reporting Administration

Workshop Search ...

### Dashboard

**Alerts** 1  
You have 111 sessions that are missing attendance.  
[View Sessions](#)

**Event Calendar** month week day  
**June 2016**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
		10:00a SO - UT-461-4371	10:00a COSMP - UT-461-4450 6:00p CPSMP - UT-461-4443	9:00a SO - UT-461-4439		
5	6	7	8	9	10	11
		10:00a SO - UT-461-4371	10:00a COSMP - UT-461-4450 6:00p CPSMP - UT-461-4443	9:00a SO - UT-461-4439		
12	13	14	15	16	17	18
		10:00a	10:00a	9:00a		

[Help Topics](#)

1. Contacting QTAC-NY
2. Printing data packet forms
3. Implementation site

[Show 98 more topics](#)

<https://compass.qtacny.org/in/sites/implementation/>

5. Then, click on the **Add New Implementation Site** button. You can also **view** and **edit** the Implementation Sites associated with your agency.

Compass QTAC

Home Sites Personnel Workshops Training Reporting Administration

### Implementation Sites

Implementation Sites

[Add New Implementation Site](#) [Export Results](#)

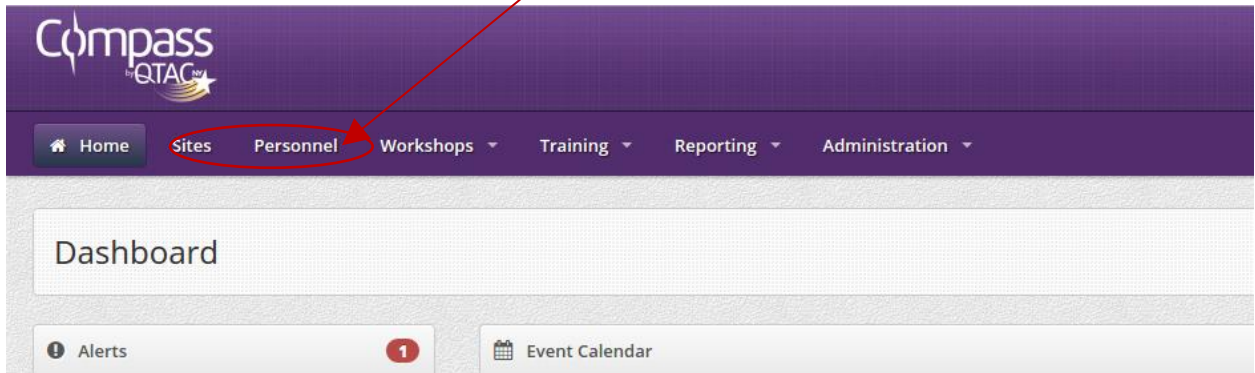
Status	Host/System Partner	Site Name	Actions
	Intermountain Healthcare	Alta View Hospital	<a href="#">Show</a> <a href="#">Edit</a>

6. Enter the required information, and then click the **Save** or **+ Save and Add** button at the end to add your new **Implementation Site**.

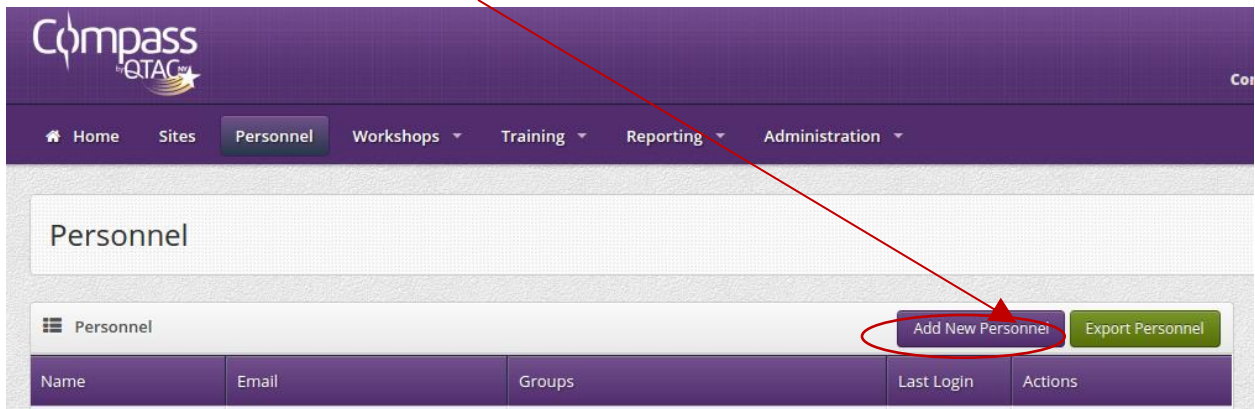
The screenshot shows the top portion of a web form titled "Add New Implementation Site". The form contains several input fields and dropdown menus, each with a red asterisk indicating a required field. The fields are: "Host/System Partner" (a dropdown menu with "Select a Host/Syste" visible), "Delivery type" (a dropdown menu with "Area Agency on Aging" selected), "Site Name", "Street Address", "Street Address Line 2", "Suite", "City", and "State". The form is displayed within a browser window with a dark header bar.

The screenshot shows the bottom portion of the "Add New Implementation Site" form. It includes three input fields: "Contact Phone" (with three separate boxes for digits), "Contact E-mail", and "DPRP Org. Code". Below the "Contact Phone" field is the text "What is the phone number of the primary contact?". Below the "Contact E-mail" field is the text "What is the e-mail address of the primary contact?". Below the "DPRP Org. Code" field is the text "If this implementation site has it's own CDC DPRP code, please enter it here." At the bottom of the form, there are two buttons: a green "✓ Save" button and a dark blue "+ Save and Add" button. These two buttons are circled in red.

7. Create new **Personnel**, if needed.



8. Click on the **Add New Personnel** button.



9. Enter all of the required **Personnel** information and click the **Save** button.

Home Sites **Personnel** Workshops Training Reporting

## Add New Personnel - Account Information

**Account Information**

Owner \* Utah

First name \*

Last name \*

Email

Phone numbers

Street Address

Address Line 2

**Account Information**

Email \*

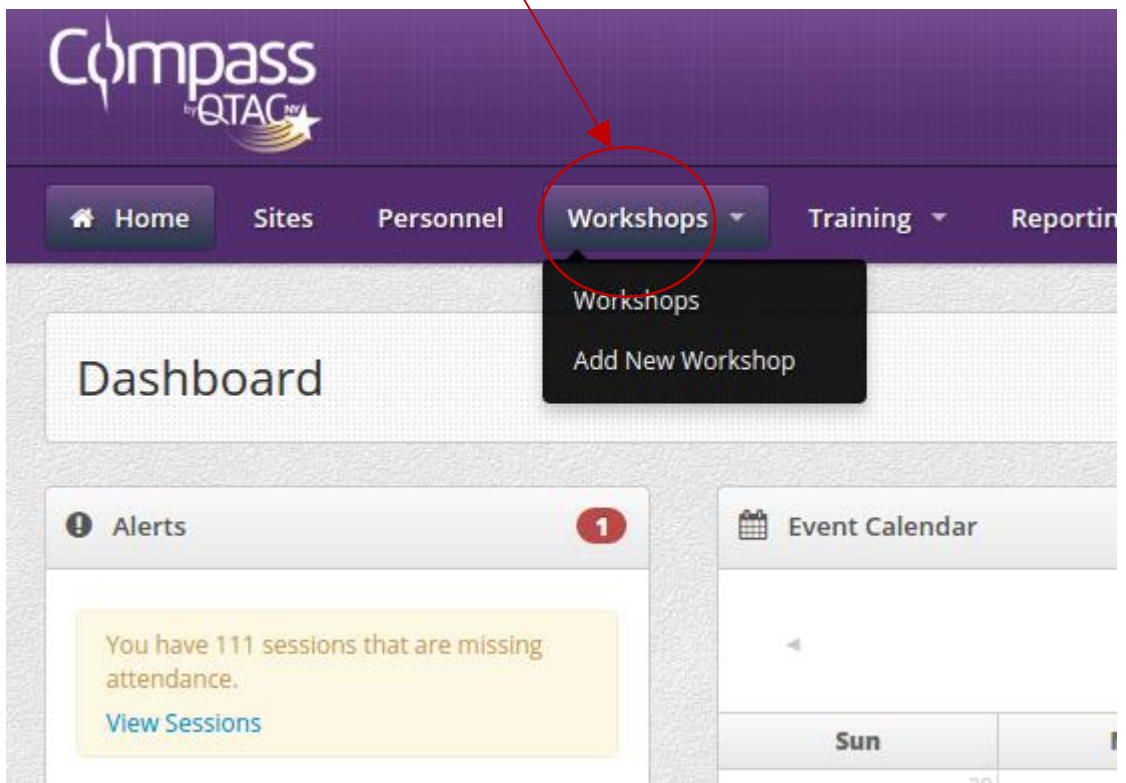
Groups \* ☐ Implementation Site - Staff  
☐ Master Trainers  
☐ Workshop Leaders

Implementation Site Access


**Subscriptions**

Subscriptions ☐ New Participants - Notify by e-mail when new participants are registered for workshops.  
☐ New Workshop - Notify by e-mail when new workshops are created.

10. Creating a **NEW workshop**: Go to the **Workshops** menu item at the top, and then click on **Add New Workshop**.



11. Fill in all of the information for a **New Workshop**, then click **Next->**.



[Home](#) [Sites](#) [Personnel](#) [Workshops ▾](#) [Training ▾](#) [Reporting ▾](#)

## Add New Workshop

Program *	Arthritis Foundation Exercise Pi ▾
Implementation Site *	Alta View Hospital ▾
Private Workshop?	<input type="checkbox"/> Should this workshop be hidden from public registration and se
Contact Phone *	<input type="text"/> <input type="text"/> <input type="text"/> ext. <input type="text"/> What phone number (and, optionally, extension) should particip
Contact E-mail *	<input type="text"/> What e-mail should participants see to send questions/inquiries
Language *	English ▾



12. Workshop description: good place to put classroom directions here and what room number your workshop will be held in:

**Workshop Description: Classroom Directions (Watch for Signs)**

- Enter the Hospital through the Main entrance or Visitor entrance.
- After you enter the building, walk south toward the Café.
- Before you enter the Café, the education center will be on your left.
- Walk down education center hall and room numbers will be posted next to room doors.

**Class will be held on the following dates:**

- April 7th, 10am-12pm, Classroom 5
- April 14th, 10am-12pm, Classroom 5
- April 21st. 10am-12pm. Classroom 3

13. Fill out the information for the **session days**, **start date** and **start time**.

The screenshot shows a web form titled "Add New Workshop". The form has three main sections for input: "Session Days", "Start Date", and "Start Time".

- Session Days:** A list of days from Monday to Sunday, each with a checkbox. Below the list is a note: "On which days of the week does this workshop take place? Please be aware of the number of sessions that each program offers, as this is the number of sessions that will be generated."
- Start Date:** A date picker field with a calendar icon. Below it is a label: "When is the first session?"
- Start Time:** A time picker field showing "1:00 AM". Below it is a note: "What time of day do sessions start? The end time will automatically be determined based on the session length specified in the program selected."

At the bottom of the form are three buttons: "Finish" (green), "Back" (grey), and "Start Over" (red). On the right side of the form is a sidebar with "Quick Links" and "Help Topics".

**Workshops - Quick Links**

- Workshop Listing
- Add New Workshop

**Site Management**

- Implementation Sites
- Add New Implementation Site

**Help Topics**


- Who are "Delivery Personnel"?
- How do I print my Data Packet forms?
- Who are "Host / System Partners"?

[Show 7 more topics](#)

[View All Help](#)

14. After you click **Finish**, you will see the details of the workshop you created below.

15. You can download the **Workshop Data Packet (Attendance Log, Participant Information Form (PIF), or Participant Post Program Survey, or Booster Session Survey)**.



Welcome back, Jessica!  
[Account Settings](#) | [Help](#) | [Logout](#)  
Contact QTAC: (877) 496-2780 | [qtaccompass@albany.edu](mailto:qtaccompass@albany.edu)

[Home](#) [Sites](#) [Personnel](#) [Workshops](#) [Training](#) [Reporting](#) [Administration](#)

Workshop Search ...

(LDS Hospital) SO - UT-461-4371

Workshop Details

Cancel Workshop

Edit Details / Leaders

Location:

LDS Hospital  
8th Ave & C Street  
Salt Lake City, UT 84143  
Salt Lake County  
Phone: (888) 222-2542

Host / System Partner: Intermountain Healthcare

Private Workshop

Status	In Progress
Language	English
Participants	16
Session Zero?	No

Leader

Name	Email Address	Phone Number	Outlook
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Workshop Data Packet

Data Packet Instructions

View

Attendance Log / Workshop Cover Sheet

Download

Stepping On Attendance Log

Download

Stepping On PIF

Download

Stepping On Participant Post-Program Survey

Download

Stepping On Booster Session Survey

Download

16. At the bottom of the Workshop Details page, you can view the **Leaders** information, the **Schedule**, and **Add New Participants** or **View Participants**.

The screenshot shows the Workshop Details page with a purple navigation bar at the top containing links for Home, Sites, Personnel, Workshops, Training, Reporting, and Administration. A search bar is on the right. The main content area is divided into three sections: Leaders, Schedule, and Workshop Participants. The Leaders section has a table with columns for Name, E-mail Address, Phone Numbers, and Options. The Schedule section has a table with columns for Date, Start Time, End Time, and Options. The Workshop Participants section has a table with columns for Name, E-mail Address, Phone Numbers, and Options. A red arrow points from the 'Add New Participant' button in the Workshop Participants section to the 'Add New Participant' button in the 'Add New User' form in the next screenshot.

Name	E-mail Address	Phone Numbers	Options
Jessica Hardcastle	jesshardcastle@gmail.com	(801) 710-7024 - Home	<a href="#">View</a> <a href="#">Edit</a>
Joann Yngsdal	joann.yngsdal@gmail.org	(801) 387-2080 - Work	<a href="#">View</a> <a href="#">Edit</a>

Date	Start Time	End Time	Options
Thursday - April 7, 2016	10:00 AM	12:00 PM	<a href="#">Edit</a> <a href="#">Attendance Log</a>
Thursday - April 14, 2016	10:00 AM	12:00 PM	<a href="#">Edit</a> <a href="#">Attendance Log</a>
Thursday - April 21, 2016	10:00 AM	12:00 PM	<a href="#">Edit</a> <a href="#">Attendance Log</a>
Thursday - April 28, 2016	10:00 AM	12:00 PM	<a href="#">Edit</a> <a href="#">Attendance Log</a>
Thursday - May 5, 2016	10:00 AM	12:00 PM	<a href="#">Edit</a> <a href="#">Attendance Log</a>
Thursday - May 12, 2016	10:00 AM	12:00 PM	<a href="#">Edit</a> <a href="#">Attendance Log</a>
Thursday - May 19, 2016	10:00 AM	12:00 PM	<a href="#">Edit</a> <a href="#">Attendance Log</a>

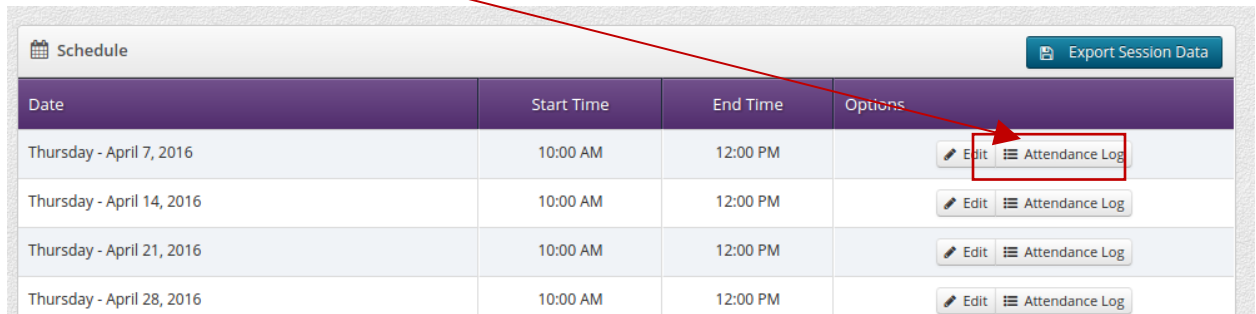
Name	E-mail Address	Phone Numbers	Options
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17. **Add New Participant:** To add new Workshop Participants, click on the **+ New Participant** button and enter the participant data and click **Save**.

The 'Add New User' form is a modal window with a dark background. It contains the following fields: Workshop (McKay Dee Hospital) SO - UT-461-4370, Registration Date (6/27/2016), First Name \*, Last Name \*, Street Address, Address Line 2, and City. A red arrow points from the 'Add New Participant' button in the previous screenshot to the 'Add New User' form.

Workshop	(McKay Dee Hospital) SO - UT-461-4370
Registration Date	6/27/2016
First Name *	
Last Name *	
Street Address	
Address Line 2	
City	

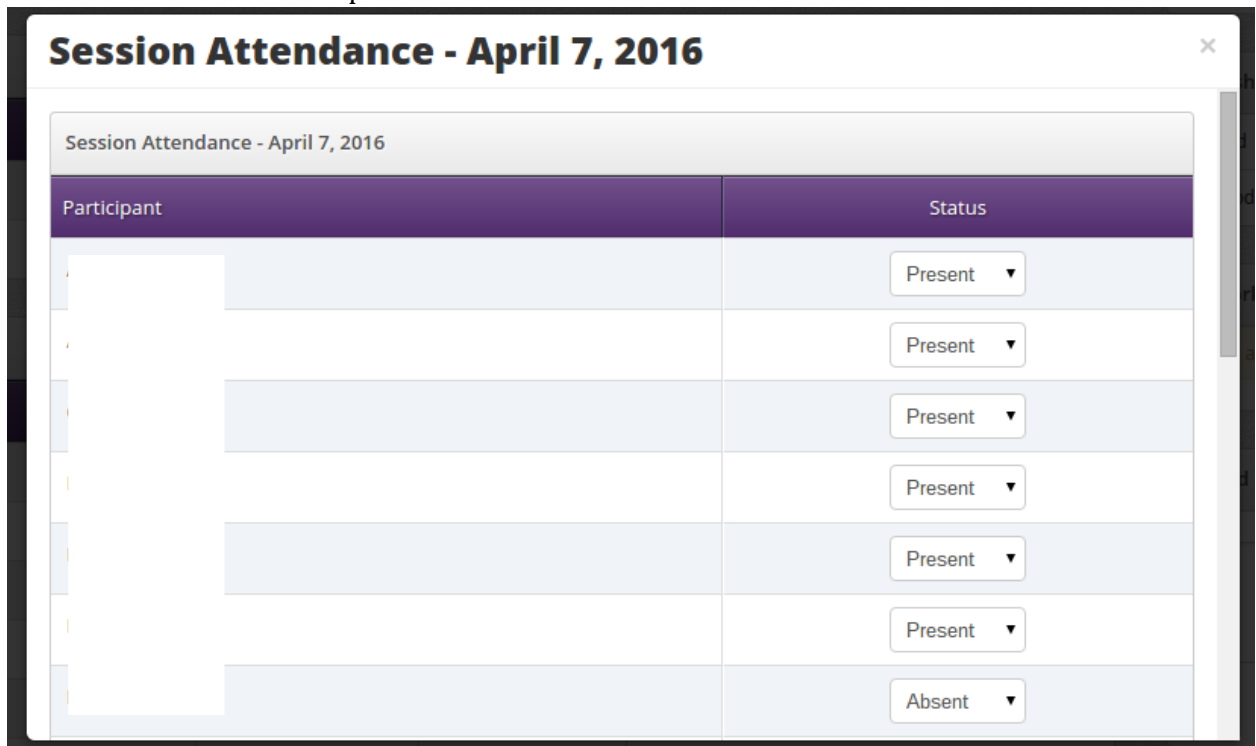
18. **Attendance Log:** you can visit the **Workshop Details** page after each workshop and update the Schedule with the attendance.



The screenshot shows a 'Schedule' table with columns: Date, Start Time, End Time, and Options. The 'Options' column contains 'Edit' and 'Attendance Log' buttons. A red arrow points from the text 'Attendance Log' in the instruction above to the 'Attendance Log' button in the first row of the table.

Date	Start Time	End Time	Options
Thursday - April 7, 2016	10:00 AM	12:00 PM	Edit  Attendance Log
Thursday - April 14, 2016	10:00 AM	12:00 PM	Edit  Attendance Log
Thursday - April 21, 2016	10:00 AM	12:00 PM	Edit  Attendance Log
Thursday - April 28, 2016	10:00 AM	12:00 PM	Edit  Attendance Log

Workshop Attendees are marked as **Present** or **Absent**.




The screenshot shows a modal window titled 'Session Attendance - April 7, 2016'. It contains a table with columns: Participant and Status. The 'Status' column has dropdown menus with 'Present' or 'Absent' options. The first six rows show 'Present' and the last row shows 'Absent'.

Participant	Status
	Present ▼
	Present ▼
	Present ▼
	Present ▼
	Present ▼
	Present ▼
	Absent ▼


\*make sure ALL of your participants are added to the workshop before you complete the attendance logs.

19. You can also input the data you receive from PIFs into Compass by clicking on **Stepping On Participant Information Form** and filling out the form with the information they provided on their PIF.



Workshop Participants

+ New Participant

 Export Data

Registered	Name	Attendance	Surveys	Options
2/11/2016		100%	<a href="#">Stepping On Participant Information Form (Edit)</a>	<div>EditSessionsDelete</div>

Once you click on the link you will see the questions from the PIFs:

1. Section 1

2. Section 2

3. Section 3

[Save Responses](#)

Stepping On Participant Information Form - Section 1

1

Did your doctor, nurse, physical therapist or other health care provider suggest that you take this program?

☐ No Response

☐ Yes

☒ No

2


If you answered "No," how did you hear about this program?

newspaper advertising

3


If you answered, "Yes," from which healthcare facility were you referred (e.g. Intermountain Medical Center)?

You can also edit contact information for participants:



Workshop Participants


+ New Participant

 Export Data

Registered	Name	Attendance	Surveys	Options
2/11/2016		100%	<a href="#">Stepping On Participant Information Form (Edit)</a>	<div><div>Edit</div><div>Sessions</div><div>Delete</div></div>

Once you click on the link you will have the option to edit the participants contact info:

## Editing User: ×

Workshop	(McKay Dee Hospital) SO - UT-461-4370
Registration Date	2/11/2016 
The date that the participant actually registered for this workshop.	
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Street Address	<input type="text"/>
Address Line 2	<input type="text"/>
City	Roy

20. **Export Participant data:** to contact participants who have registered in Compass:

- Click on the upcoming workshop (either from the calendar or from the “Workshops” button towards the top left side of the page)
- Scroll down to where it says “Workshop Participants”
- To the right of where it says “Workshop Participants,” click on the blue box that says “Export Data”
- From the dropdown box, click on Participant Information
- This will automatically download the contact information from all registered participants into an Excel file.
- Once it downloads, double-click the Excel file to open (in the bottom left corner if you are using Chrome). NOTE: You will need to widen the columns to view participants’ full email addresses and phone numbers.

Workshop Participants				
			<a href="#">+ New Participant</a>	<a href="#">Export Data</a> ▼
Registered	Name	Attendance	Surveys	Options
2/11/2016	<input type="text"/>	100%	<a href="#">Stepping On Participant Information Form</a> (Edit)	<a href="#">Edit</a> <a href="#">Sessions</a> <a href="#">Delete</a>

21. **View Workshops:** go to the **Workshops** menu at the top, and click on **Workshops**. You can also **Add a New Workshop from** here or edit existing workshops.

**Workshops**

Add New Workshop

Add New Workshop Export Workshops

Language	Name	Implementation Site	Enrolled	Status	Start Date	Actions
English	CDSMP - UT-461-4076	TOSH	0	Completed	Jan 20, 2015	Show Edit Delete

You can also view workshops from the homepage/dashboard on the calendar. Click on the workshop to see details.

**Dashboard**

Alerts: You have 111 sessions that are missing attendance. View Sessions

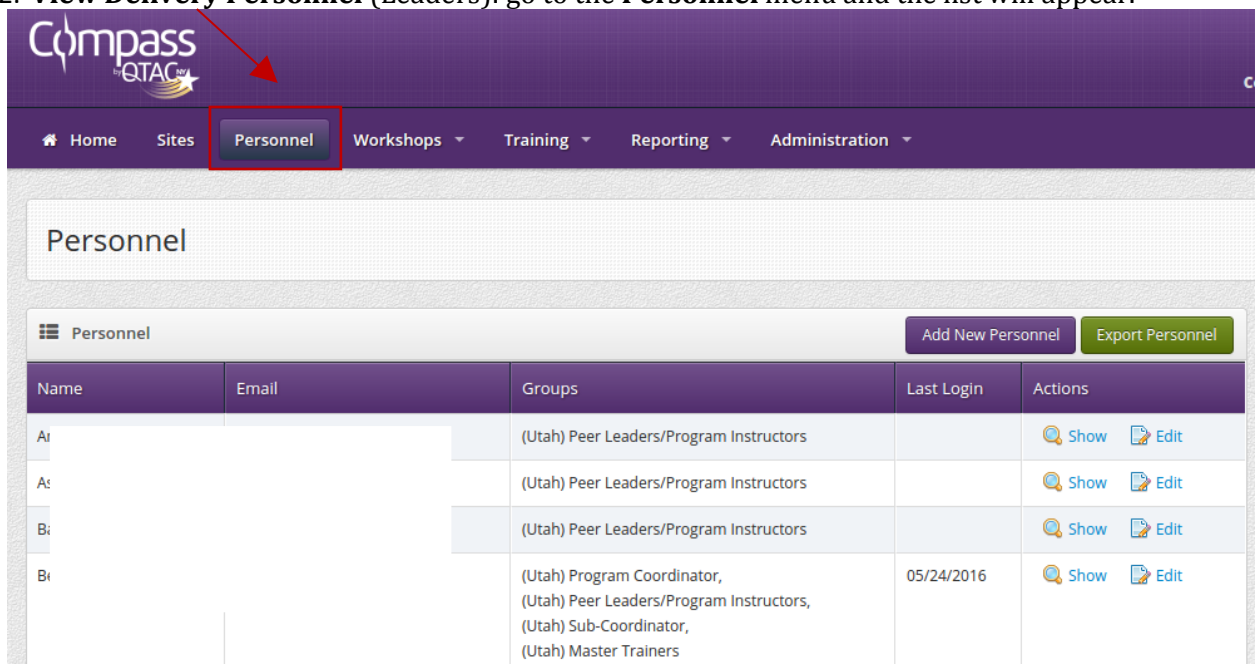
Help Topics: 1. Contacting QTAC-NY, 2. Printing data packet forms, 3. Implementation site, Show 98 more topic(s)

**Event Calendar** (month view)

**June 2016**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31 10:00a SO - UT-461-4371	1 10:00a CDSMP - UT-461-4450 6:00p CPSMP - UT-461-4443	2 9:00a SO - UT-461-4439	3	4
5	6 10:00a SO - UT-461-4371	7 10:00a CDSMP - UT-461-4450 6:00p CPSMP - UT-461-4443	8 9:00a SO - UT-461-4439	9	10	11
12	13 10:00a	14 10:00a	15 9:00a	16	17	18

22. **View Delivery Personnel (Leaders):** go to the **Personnel** menu and the list will appear.



The screenshot shows the Compass by QTAC web application interface. The top navigation bar is purple and contains the following links: Home, Sites, Personnel, Workshops, Training, Reporting, and Administration. The Personnel link is highlighted with a red box and a red arrow pointing to it from the instruction text above. Below the navigation bar, the main content area is titled "Personnel". Under this title, there is a sub-header "Personnel" with a hamburger menu icon on the left and two buttons, "Add New Personnel" and "Export Personnel", on the right. Below the sub-header is a table with the following columns: Name, Email, Groups, Last Login, and Actions. The table contains four rows of data. The first three rows show personnel with the group "(Utah) Peer Leaders/Program Instructors". The fourth row shows a personnel member with multiple roles: "(Utah) Program Coordinator, (Utah) Peer Leaders/Program Instructors, (Utah) Sub-Coordinator, (Utah) Master Trainers". The last login for this person is "05/24/2016". Each row has "Show" and "Edit" links in the Actions column.

Name	Email	Groups	Last Login	Actions
Al		(Utah) Peer Leaders/Program Instructors		<a href="#">Show</a> <a href="#">Edit</a>
As		(Utah) Peer Leaders/Program Instructors		<a href="#">Show</a> <a href="#">Edit</a>
Bi		(Utah) Peer Leaders/Program Instructors		<a href="#">Show</a> <a href="#">Edit</a>
Br		(Utah) Program Coordinator, (Utah) Peer Leaders/Program Instructors, (Utah) Sub-Coordinator, (Utah) Master Trainers	05/24/2016	<a href="#">Show</a> <a href="#">Edit</a>



23. **Account Settings:** go to your settings to **Edit Your Profile** information.

The screenshot shows the Compass QTAC dashboard. At the top, there is a purple header with the Compass QTAC logo on the left and a welcome message on the right: "Welcome back, Jessical" with links for "Account Setting", "Help", and "Logout". Below the header is a navigation bar with links: Home, Sites, Personnel, Workshops, Training, Reporting, and Administration. A search bar is located on the right of the navigation bar. The main content area is titled "Dashboard" and contains two sections. On the left, there is an "Alerts" section with a red notification icon and a message: "You have 111 sessions that are missing attendance. View Sessions". On the right, there is an "Event Calendar" section with a calendar for June 2016. The calendar shows events for Tuesday, Wednesday, and Thursday. A red arrow points from the "Account Setting" link in the header to the "Edit Your Profile" section in the next screenshot.

24. Change your **subscriptions**, update your **password**, or **Update Security Profile**.

The screenshot shows the "Edit Your Profile" page. On the left, there is a sidebar with "Account Settings" and "Help Topics". Under "Account Settings", there are three links: "Your Profile", "Change Your Password", and "Update Security Profile". Under "Help Topics", there are two links: "1. Who are 'Delivery Personnel'" and "2. How do I print my Data Packet forms?". On the right, there is a "Your Information" section. It contains a "Subscriptions" section with two checkboxes: "New Participants - Notify by e-mail when new participants are registered for workshops." and "New Workshop - Notify by e-mail when new workshops are created." Below this is a "Current password:" field with a red asterisk and a password input field. At the bottom of the "Your Information" section is a "Save Profile" button. Three red arrows point from the "Subscriptions", "Change Your Password", and "Update Security Profile" links to the "Your Information" section.